

SOP-01 Enquiry to booked job

Work sample · realistic data, built to show how I approach this work | Owner: Office | Review: after the first month, then every six months

Purpose

Every enquiry becomes one ServiceM8 job against the right client, with the right template, booked to someone who holds the licence for it.

Steps

1. **Find the client first.** Search by phone, then email, then street. Property managers and builders are one client each; the property is the job address, not a new client.
2. **New client only if nothing matches.** Enter the billing name as it should appear on the invoice (business name for companies), phone, email and billing address.
3. **Pick the template.** Choose one of the 25 job templates (Category Rules tab lists the words that point to each). It adds the category, badge, form and usual materials. If unsure, ask the caller one more question rather than guessing.
4. **Quote or Work Order.** Quote when the customer wants a price first (hot water replacements, bathroom and kitchen work). Otherwise create the Work Order directly.
5. **After hours.** If the job will start before 7am, from 6pm, or on a weekend, add the after-hours call-out and after-hours labour items now.
6. **Book it.** Schedule to a staff member who holds the licence the template needs (Staff tab). Gas work only to licensed gasfitters; backflow only to the accredited testers.
7. **Confirm.** Send the booking confirmation to the customer and the site contact (for agency jobs, the tenant's details go in the job notes, not on the client).

Rules

- Never create a second client for the same customer. If you find one, tell the office lead; clients are merged, not deleted.
- No access codes or key-safe numbers in the job description. They go in the private job notes only.
- A declined quote is marked Unsuccessful with the reason, never deleted.

SOP-02 On site to invoice and Xero draft

Work sample · realistic data, built to show how I approach this work | Owner: Plumbers and office | Review: after the first month, then every six months

Purpose

Every completed job raises an invoice from the job itself, at the right rate, and reaches Xero as a draft the office approves. This is what stops the misses found in the billing check.

Plumber, on site

8. **Check in on arrival.** Start the job in the app so the time is recorded.
9. **Fill the form.** Complete the template's form (e.g. hot water install checklist, drain camera report). The job can't be completed without it.
10. **Materials.** Add materials from the pricebook. If an item isn't there, add a note with the supplier code; don't type a free-text price.
11. **Photos.** Before and after photos on the job, plus the compliance plate for hot water and gas work.
12. **Compliance.** For gas work, record the compliance certificate details for the licensed gasfitter in the form. For backflow, record each device's readings.
13. **Complete.** Mark the job Completed before leaving the site, even if payment is taken later.

Office, same day

14. **Review completed jobs.** Check hours, materials and the after-hours items against the job times.
15. **Invoice.** Raise the invoice from the job; it goes to Xero as a draft with the job number in the reference.
16. **Approve in Xero.** The bookkeeper approves and sends drafts in Xero; payments are reconciled in Xero as now.
17. **Never type an invoice in Xero directly** for job work. If a credit is needed, raise it against the original invoice and note the job number.

Weekly check (bookkeeper, 10 minutes)

- Every job Completed in the week has a draft or approved invoice in Xero with its job number.
- No two invoices carry the same job number.
- Work Orders older than 7 days with no activity are followed up.

SOP-03 Recurring backflow testing

Work sample · realistic data, built to show how I approach this work | Owner: Office and accredited testers | Review: after the first month, then every six months

Purpose

Each of the 132 backflow sites has one recurring job every 12 months covering all its devices, so no annual test is missed and the register is always current.

Steps

18. **Weekly.** Look at recurring backflow jobs due in the next four weeks. Contact the site to confirm access.
19. **Book.** Assign to an accredited tester only. The device count on the job sets the fee and the time.
20. **Test.** The tester completes the Backflow test report form for each device: device ID, type, size, readings, pass or fail, and their accreditation number.
21. **Failed device.** Quote the repair as a separate job, then retest. The recurring job stays on its 12-month cycle.
22. **Report.** The office sends the test report to the water corporation in the format it asks for, and a copy to the owner or agent.
23. **Invoice.** Invoice from the job as in SOP-02 (backflow test fee x devices).
24. **New or removed devices.** Update the device list on the client and the device count on the recurring job the same day.

Rules

- The next test date comes from the last test done, never from the date the job was booked.
- Overdue devices found at go-live are booked over the first two weeks.
- Nothing is deleted. A site that stops using the business has its recurring job ended, with the reason.